

OSE 2011 Annual WMBE Plan

1. Department Representative

OSE's WMBE representative is Jeanie Boawn, Executive Assistant.

2. 2011 Goals

Summarize your department 2010 WMBE goal attainment and discuss the specific challenges and successes your Department experienced in meeting or exceeding 2010 WMBE goals. You may also discuss challenges and successes in meeting and exceeding WMBE goals in years prior to 2010.

In 2010, OSE achieved 5.5% WMBE utilization overall, but this number includes very large contractual outlays for ARRA-related projects to single vendors in many cases.

OSE's general fund budget utilized WMBE firms for about 17% of its total spending. The breakdown is as follows:

Consultant contracting: 15%

Blanket voucher purchases: 41%

Direct voucher: 32%

Purchase contract: 0%*

* These purchases were for the Trees for Neighborhoods program, which provided 1,000 trees and water bags to residents. Trees of the size and quality required are only available through a select number of vendors in our area, and WMBE was not available. These purchases accounted for 11.5% of our total discretionary spending.

Our overall 2010 performance was much lower than our 2009 and 2008 performance (29% and 31% respectively). Most of this is due to lower WMBE usage in consultant contracts (**which was at 30% in 2009 and 29% in 2008**). OSE uses consultants for a variety of tasks, with a heavy focus on technical and specialized purposes, such as greenhouse gas reduction analyses. RFPs are issued for most of these opportunities and potential WMBE vendors are sought, but WMBE consultants with this type of experience are not common.

Our aspirational goal for 2011 is to have 30% WMBE utilization in OSE's General Fund budget, similar to 2009 and 2008. While continuing to look for additional vendors we can use for blanket and direct voucher purchases, the main area we will focus on is in consultant contracts, specifically those having to do with community outreach and communications (see #7 below).

In addition, we will look for the best opportunities to utilize WMBE firms in our grant-funded programs where there is the latitude to do so. Several of the large contracts for the grant programs are related to loan financing, where the vendor will make payments to the contractors who are providing the work. The contractor pool is guided by a workforce agreement which has its own embedded goals for targeted workers (i.e., new to the workforce, low income, veterans). Thus, although the City is paying the loan finance vendor, there will be no way to capture the way those funds are actually disbursed to contractors involved in the program other than a completely separating reporting mechanism for the grant.

3. Project Specific Strategies and Objectives

We will explore the idea of focusing efforts on a specific project. The project with the most potential for a special focus is community outreach we will be doing later this year to develop a new Climate

Action Plan. This will be a visible project where we hope to engage residents from all backgrounds and areas of Seattle in the conversation about how Seattle can achieve carbon neutrality.

4. Department Training

Most of OSE's staff (all are strategic advisors who manage specific programs) have been trained on our WMBE outreach and utilization goals and are adept at using the vendor search tools, announcing projects to a wide variety of vendors and utilizing a broad range of vendors.

That being said, OSE has several new grant-funded staff. We will make sure they are up to speed on the available tools and resources.

5. Outreach Events

OSE will participate in forums and trade shows as feasible. With limited staff resources in our department, it can be challenging to attend them all but we will make every effort to participate when possible. In addition, OSE's purchasing needs outside of consultant contracting are very limited (we anticipate spending less than \$42,000 of our total budget on non-contractual and non-staff costs, about 3% of our budget), so we would likely focus staff time on forums related to consultant contracts.

6. Consultant Inclusion Plans

OSE's General Fund budget does not execute contracts above \$260,000. We will work with grant-funded staff and any General Fund staff (this will likely be about 2-3 people total) who may execute contracts with subcontracting opportunities to ensure they are developing Inclusion Plans as appropriate. This is an area where we could use more training, so Jeanie will do some work on this.

7. Additional Strategies and Efforts

OSE's major challenge that limits WMBE utilization in contracts is the limited pool of money we work with and the highly technical nature of the work we do with that money. For example, the major expenses for OSE's 2011 discretionary budget will be creating a new Climate Action Plan and developing district energy strategies. Both of these are very technical projects with a small number of potential vendors. Because of that, we will put a lot of focus on recruiting WMBE vendors with the remaining discretionary dollars we have, as well as the above goal for Inclusion Plans for our larger contracts.

Another strategy we'll look at is long-term development of new firms. Given the emerging nature of much of the work we do, we hope that more WMBE businesses will move into the climate emissions and energy efficiency sectors and we can look for opportunities to assist in this endeavor.